



VISION 2020 FISCAL RESOURCES TASK GROUP
Meeting Minutes 7:30 PM 1/18/18

Senior Center First Floor Conference Room

ATTENDEES: Gordon Jamieson (Co-Chair), Davis Gabarino Co-Chair), Pete Howard (Secretary),

Review of Leadership Interview: Gordon provided hard copy (Ref 1) that we read and made small edits. A photo is needed. The Advocate may run this as an op-ed piece.

Review of Citizens Corner #6 Town Budgeting Process: Gordon provided hard copy (Ref 2) that we read and made small edits.

Gordon will submit both essays requesting Citizen's Corner #6 be printed first followed in a later edition by the Leadership interview.

Gordon has found a site that will convert the audio recording to editable text.

The next interview will be of Superintendent Kathy Bodie. David and Heather will conduct the interview. Gordon will contact Kathy and suggest the winter vacation week, 2/19-2/23.

Next mtg Feb 15, 2018 The Town Treasurer Dean Carman will attend. Deputy Treasurer Michael Morse has also been invited.

Meetings monthly - 3rd Thursdays 7:30 PM - Usually in Senior Center

Ref 1 Leadership Interview

Ref 2 Citizens Corner #6

Ref

LEADERSHIP INTERVIEWS

Over the past year, V2020 Fiscal Resources Task Group has published a series of articles detailing various aspects of how our town functions including: town elections, town meeting, town/school departments and the budgeting process. This week we launch into a series of interviews with town department and committee leaders which we hope will provide residents with an insight into the people that manage town/school budgets and departments. We begin our series with Town Manager, Adam Chapdelaine.

HOW LONG HAVE YOU BEEN IN YOUR CURRENT JOB: I have been the Town Manager since February of 2012, so just over 5 ½ years.

WHAT IS THE CAREER PATH THAT LED YOU TO THIS LINE OF WORK: I've worked in state and local government since graduating with my B.A. in Political Science in 2011. I was employed in the Massachusetts State House early in my career and earned my M.B.A. in the evenings at Suffolk University. I knew early on that I wanted to transition to local government, and I received my first municipal opportunity with the City of Fall River in 2008. Following that I came to Arlington in 2010 as the Deputy Town Manager and have been Town Manager since 2012.

HOW DO YOU ANSWER WHEN SOMEONE ASKS WHAT A TOWN MANAGER DOES: I tell them that it's a bit like being mayor in that it has chief executive responsibilities and authority. However, in the town form of government, it's not like the mayor because it's not elected and you share some of the responsibilities with the elected Board of Selectmen. It's different in that the legislative body is a town meeting and convenes less frequently than a city council or town council. As Town Manager, I have responsibility for overseeing the day-to-day operations of most of the town's departments as well as being responsible for budget development and management.

WOULD YOU RATHER BE MAYOR OR TOWN MANAGER: I like being Town Manager in that there's a bit of a firewall between me and politics. Of course, I'm not completely removed from politics. I'm attuned to what's going on in the community and with the Board of Selectmen. However, since I'm not always running for re-election, I can make decisions that might be politically difficult upfront but are better for the town in the long run.

WHAT ASPECT OF YOUR WORK HAS THE GREATEST IMPACT ON RESIDENTS: When the work of municipal departments is done correctly, it goes fairly unnoticed. Arlington does a good job with the basics, giving me the freedom to focus on making sure all departments share a culture of making service to the residents of Arlington our top priority. My goal is to develop a team that works well together and is comfortable pointing out areas where we can improve our interactions with each other and the community we serve.

WHAT CHALLENGES COME WITH THE JOB: Our biggest overarching challenge is dealing with the structural budget deficit imposed by Proposition 2½. In addition, there is the need to educate residents so that they feel they're getting good value within the framework of our limited resources. Arlington is very lucky to have many excellent Department heads who do a great job of managing their departments and coming in with reasonable budget proposals. The town is considered a good place to work, in part because of the stability of our funding commitments.

IS ARLINGTON MORE CONSTRAINED BY ITS RESOURCES THAN NEIGHBORING TOWNS: Yes. There are a couple of ways to look at it. In broad strokes, we are limited by the fact that we are only five and a half square miles and our residential base is nearly built-out, giving us limited opportunities for new residential growth. Neighboring communities have much larger commercial bases. Our commercial base contributes only 5% of our tax revenues. The other budget challenge is meeting the needs of the school department. We are faced with a growing enrollment that is an outgrowth of Arlington's being such a desirable community in which to live and raise children. In the past, there may have been a feeling that it was the town departments versus the school department, but I think we've moved beyond that. People like the schools. They like the Fire Department. They like the Police Department, the Public Works. I appreciate the Selectmen's policy that overrides are for all. We sink or swim together. When one aspect of a town thrives, so do all the others.

SHARE A MOMENT THAT REMNDED YOU OF THE WAYS IN WHICH YOUR DEPARTMENT'S WORK MAKES THE TOWN BETTER FOR THE RESIDENTS: I was fairly new to the job when the micro-burst hit East Arlington. It pretty much devastated a square mile area. Two hundred trees came down. No one had power. And almost immediately, all the relevant departments were on the scene. The Building Inspector was there. The Fire chief was there. The Police Chief was there. The Director of the Department of Public Works was there. Everyone was working smoothly together to marshal their resources. I was profoundly moved to witness a concrete demonstration of how these crucial departments join forces to serve our community. I realized these competent individuals were the people I'd be working with as Town Manager. It was a powerful moment for me to see them functioning in unity to get the impacted part of the town up and running as quickly as possible. And they did it. I didn't cut any trees. *They* did it. It was a moving example of town government at its best.

WHEN YOUR COUNTERPART FROM ANOTHER STATE ASKS YOU ABOUT ARLINGTON, HOW WOULD YOU DESCRIBE OUR COMMUNITY: I would say that Arlington is a close suburb of Boston that has become an increasingly desirable place for people to live for many reasons: the quality of the schools, the proximity to employment, the parks, the restaurants. It's the quality of life, the walkability. Then I would talk about how as a

government it is one of the most, if not the most, participatory of the participatory forms of government. We have representative town meeting. We do a number of public forums on all issues over the course of the year. The count on the website is now eighty boards and commissions. I praise Arlington as a welcoming, engaged place that's just packed with interesting people: authors, scientists, entrepreneurs, titans of industry, all the incredible people who live here. I always speak glowingly of the community.

WHAT PART OF YOUR JOB BRINGS YOU THE MOST SATISFACTION? WHAT DO YOU FIND MOST FRUSTRATING: The part that gives me the most professional and personal satisfaction is the opportunity to work on the issue of climate change, energy efficiency, and renewable energy. Though that is not core municipal work, it is certainly my personal passion. It was great timing that when I came here in 2010 as the Deputy Town Manager, the town was about to apply to become a green community. The then Town Manager asked, "Why don't you go work on this committee to help them out with this?" And that really triggered for me a sort of a love affair for working on these initiatives. I think we've been able to get a lot done and continue to get a lot done. We have solar on six schools. That is a real source of personal satisfaction and a driver for me. The frustrating part - and this is probably a personality challenge that I have - is that I have a desire to make everybody happy. I like to keep people happy and satisfied and in a lot of ways that's a good thing because it drives me to higher levels of customer service. But it can also lead me to be frustrated when due to limited staffing or resources, we're not able to provide citizens with what they want. The response to that frustration is to try to find a way to communicate with residents that helps them feel engaged with and cared for even if you're not able, even if you have to tell them to tell them that you're not able to provide something.

THE FISCAL RESOURCES TASK GROUP IS ONE OF THE VISION 2020 VOLUNTEER CLUSTERS DESIGNED TO GIVE CITIZENS INPUT INTO COMMUNITY GOALS FOR ARLINGTON. WHAT WOULD YOU HOPE TO SEE YOUR DEPARTMENT ACHIEVE BY 2020: The over-arching goal for me is working with the Board of Selectmen, the School Committee, the Finance Committee, and anybody else who wants to be part of it to put together all the information that's going to be necessary to deal with the need for an upcoming operating over-ride and a debt exclusion. Based on the current timelines, that is really going to take the lion's share of the effort and focus coming out of the Town Manager's office over the next two to two and a half years. It will be the ten years since the last override. We also need to help people understand the need for a debt exclusion which would support the bonds or the debt associated with rebuilding the high school. The latter is spread over thirty years, so it's not as immediately big as it sounds. My role is not to advocate for favorable votes but to put information together in a way that helps people understand the issue.

WHAT DO YOU DO ON YOUR OWN TIME -- HOBBIES, FAVORITE FAMILY ACTIVITIES, ETC.: I have two children: a daughter who's about to turn three and a son who is seven months old and nearly all of my time not in town hall is spent with them. I'm at that point in life where my focus is almost entirely on the kids. When I'm not actively involved with my kids, I like running and trying to stay healthy. There is no shortage of places to run in Arlington. There are lots of paths. One of the best parts about being a parent -- other than just the fact of having kids, which is great -- is really starting to build a whole new set of connections in the community with the parents of the other children at daycare. I'm sure that will continue as the kids move through school. I love good food and we're in such a great town for that. The few nights that my wife and I can get out, we can go to any number of wonderful places around town. We can walk to them or take the bus. It's easy to get everywhere.

FINALLY, IS THERE ANYTHING ELSE THAT YOU WOULD LIKE TO ADD: Thanks for starting a series that will help the residents by putting a name and a face to the people who provide the town services. Humanizing things helps. When I was younger and heard people say the budget was everything, I thought they only cared about money, but that is not the case. The budget reflects your values. It drives your policy. It's the level of service you want to provide. Where you put your dollars is where your values are. Community values. Personal values. Money makes it possible to do the things we want to do whether it be picking up trash or fixing potholes, striping bike lanes, improving sidewalks for pedestrians, or providing handicapped accessibility. All the matters that *matter* take money.

~ The Vision 2020 Fiscal Resources Task Group embraces and works to help the Town better realize the following Town goal: "We value Arlington's efficient delivery of public services providing for the common good. The benefits from these services and the responsibility of taxation will be equitably distributed among us. We will be known for our sound fiscal planning and for the thoughtful, open process by which realistic choices are made in our Town." We meet monthly and all are welcome to attend.

Citizens Corner #6

The Town Budgeting Process

Each Spring during the annual town meeting, Arlington's Town Meeting Members vote to approve a budget of more than \$150 million for the fiscal year commencing on the following July 1st. Residents can be confident in the vote that Town Meeting takes because of the detailed budget and revenue information included in the reports and information provided to members by the Town Manager's Office, the School Committee, the Capital Planning Committee, and the Community Preservation Act Committee; and perhaps most importantly the report submitted by the Finance Committee. In this article we will discuss how this information is developed, compiled and how that leads to the final votes on the floor of Town Meeting.

Starting in September, eight months before Town Meeting votes on the budgets, the Town Manager works with the Long Range Planning Committee and Budget and Revenue Task Force to estimate the revenues that will be available (Property taxes, State grants, Reserve/Stabilization funds, etc.) to support town/school functions. These committees include representatives of key town committees and departments. An important tool is the Long Range Financial Projection (which covers the current budget year and the next five years going forward). After a review of available revenues, the committee decides how to best apportion revenues between town and school departmental operations, capital expenses, non-departmental expenses such as pensions and health insurance and allocations to reserve accounts.

Once the initial budget framework has been determined, in late fall the Manager collects requests for operating funds from each of the town departments as well as the enterprise funds. These requests cover employee salaries and benefits as well as funds needed for supplies and contractors and will be used to develop the town side's budget.

Similarly, the Superintendent of Schools collects budget requests from each school and works with the School Committee Budget Subcommittee to develop a detailed budget. After several months of discussion and public hearings in the Spring the School Committee votes to approve a detailed school budget.

At this time, the Manager and the Capital Planning Committee also begin the process of collecting capital requests (vehicles, heavy equipment, buildings, roads, parks, etc.) from all departments. The Manager works with the Capital Planning Committee (which includes department representative and citizen volunteers) to evaluate and schedule the different capital projects. The projects recommended for the next fiscal year will be included in the capital budget; others will be placed in a Five Year Plan for inclusion in a later year's budget.

In parallel to the Capital Planning process, the Community Preservation Act Committee reviews the applications for project funding received in September and develops a list of proposed expenditures consistent with available revenues.

By January 15, the manager delivers a budget proposal to the Board of Selectmen and the Finance Committee. This budget includes details for all departments except the schools. For the schools, the overall budget contains just the bottom line revenue allocation. This is because, by state law, while Town Meeting votes on the total amount allocated to the School Department, only the School Committee is authorized to determine how school funds will be allocated.

In February and March the Finance Committee, a standing volunteer committee of Town Meeting, reviews in detail the budget of each department and the enterprise funds to understand the details the proposed expenditures. It also receives and reviews detailed budget proposals from the School Department, the Capital Planning Committee and the Community Preservation Act Committee. It then prepares its report to Town Meeting, after consulting with the relevant group; correcting or modifying the recommendations it has received as required.

The reports from the Finance, Capital Planning, School Department and Community Preservation Committees together with the Town Managers Annual Financial Plan are presented to Town Meeting Members for their review and consideration prior to the respective budgets coming before Town Meeting for a vote. Prior to the final vote, each budget item is open for debate on the floor of Town Meeting. This gives Town Meeting Members a final chance to inquire about budgetary specifics and/or seek clarification regarding of each budget. After debate is completed a final vote is taken and upon a positive vote (two-thirds if bonds are involved) the budget for the next fiscal year is adopted.

During the budget's fiscal year, the Town Manager, Superintendent, Department Heads and the finance committee regularly monitor and review departmental expenditures to insure that each budget is adhered to as closely as possible. Should something unexpected come up, the Finance Committee has the authority to appropriate as needed from the (Annual) Reserve Fund. If the need is larger than the Reserve Fund can accommodate, (the Reserve Fund is about 0.5% of the total budget) a Special Town

Meeting must be called to appropriate additional funds to cover the shortfall, but because of the careful work outlined above, this is a rare occurrence.

If you wish to learn more, Reports to Town Meeting as well as the Annual Financial Plan, Annual Report of the Town as well as additional financial information are available on the Town's website. And should you wish to participate in the process the various committees are always looking for additional volunteers to assist them in their work.

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